

Missouri State Energy Planning (MoSEP) Summary and Action Report Cycle 1



MISSOURI
DEPARTMENT OF
NATURAL RESOURCES
DIVISION OF ENERGY

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1. Introduction

The Missouri Department of Natural Resources (department) initiated the Missouri State Energy Planning (MoSEP) process in late 2020. The MoSEP process was intended to identify and address topics critical to Missouri's current and future energy needs through an ongoing series of stakeholder engagement workshops. The beginning of the process included the release of updated energy-related data and a Virtual Energy Stakeholder Kickoff Workshop held to share information and to identify stakeholder priorities for energy planning.

Based on stakeholder feedback and the market-driven transformation already underway in the energy sector, the department decided to pursue the MoSEP process through a series of regionally focused initiatives unified by state-level core values. The core values of the process are to:

- Assure secure, reliable and resilient energy infrastructure and supplies.
- Enhance Missouri's competitive position in business retention, expansion and attraction through affordable rates and renewable energy options.
- Develop diverse in-state energy resources.
- Create opportunities for energy-related technological innovation and workforce development.
- Ensure affordability and equity in access to energy resources, services and programs.
- Promote the efficient and environmentally sound use of energy.¹

In the context of the MoSEP process, an initiative was defined as: Any work, effort, process, or project that contributes toward the advancement, achievement or support of any of the six MoSEP core values. Initiative selection considered whether proposals were:

- Regionally relevant
- Consensus-based (to the greatest extent possible)
- Actionable
- Time-bound
- Measureable

To accomplish its goals, the MoSEP process leveraged the six economic development regions defined by the Missouri Department of Economic Development² to facilitate coordination with that department's regional experts and efficiently use existing state knowledge of common local interests.

¹ Missouri Department of Natural Resources' Division of Energy (2021). [*Missouri State Energy Planning \(MoSEP\) Summary and Action Report: Process Kickoff and Next Steps – PUB2968*](#). Missouri Department of Natural Resources.

² Missouri Department of Economic Development. "[Contact Us](#)." Missouri Department of Economic Development.

Through two rounds of meetings in each region between August and December 2021, the department identified initiatives, champions and key stakeholders in order to support regional priorities and needs. Those topics that met the above initiative criteria were selected as “formal initiatives.” Champions — individuals motivated by and interested in initiative concepts — partnered with the department to move initiatives forward, lead workgroups and collaborate in the development of reports and metrics. The department planned for the initiatives to identify process and impact metrics, with a focus on metrics that were quantitative to the extent practical, clearly defined, time-bound, tied to goal achievement and based on readily available information agreed upon during initiative development.

The department identified the following formal initiatives for Cycle 1:³

- Streamlining solar permitting.
- Electric vehicle infrastructure development.
- Residential energy efficiency real estate valuation/energy efficiency on the real estate industry’s multiple listing service
- Energy system training and installation at schools
- Missouri metals and battery storage
- Information hub to collect and disseminate best practices and opportunities in the energy sector

Initiative champions presented on their progress at the May 23, 2022, Formal Initiative Roundup meeting.⁴ The information in this document builds on that initial information and the templates provided by these groups.

³ Missouri Department of Natural Resources’ Division of Energy (2022). [Missouri State Energy Planning \(MoSEP\) Process Cycle 1 Initiatives](#). Missouri Department of Natural Resources.

⁴ Hyman, Martin and Kelley, Cherylyn (2022, May 23). [Missouri State Energy Planning \(MoSEP\) Process Cycle 1: Formal Initiative Roundup](#). [Video Conference Session]. Missouri Department of Natural Resources’ Division of Energy.

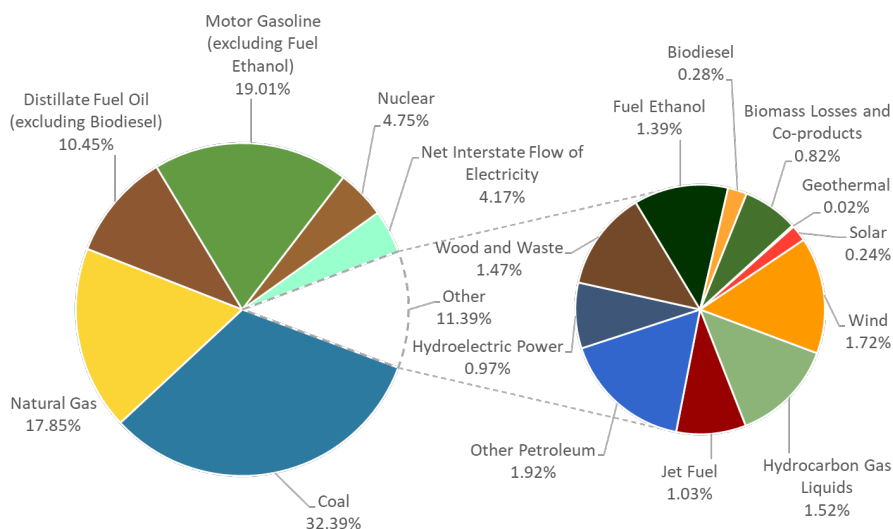
2. Background on Missouri's Energy Landscape

This section provides the most recent energy data available about Missouri's energy landscape, as well as information on future energy considerations.

a. Current Energy Profile⁵

In 2020, most of the primary energy⁶ consumed in Missouri came from coal (32.39%), followed by motor gasoline (19.01%, excluding fuel ethanol) and natural gas (17.85%).⁷ Most of the energy consumption in Missouri in 2020 occurred in the transportation sector (30.05%), followed by residential consumption (29.76%).⁸

Figure 1. Primary Energy Consumption in Missouri by Fuel Source, 2020⁹



⁵ Missouri Department of Natural Resources' Division of Energy (2022). [Energy Data Dashboard](#). Missouri Department of Natural Resources.

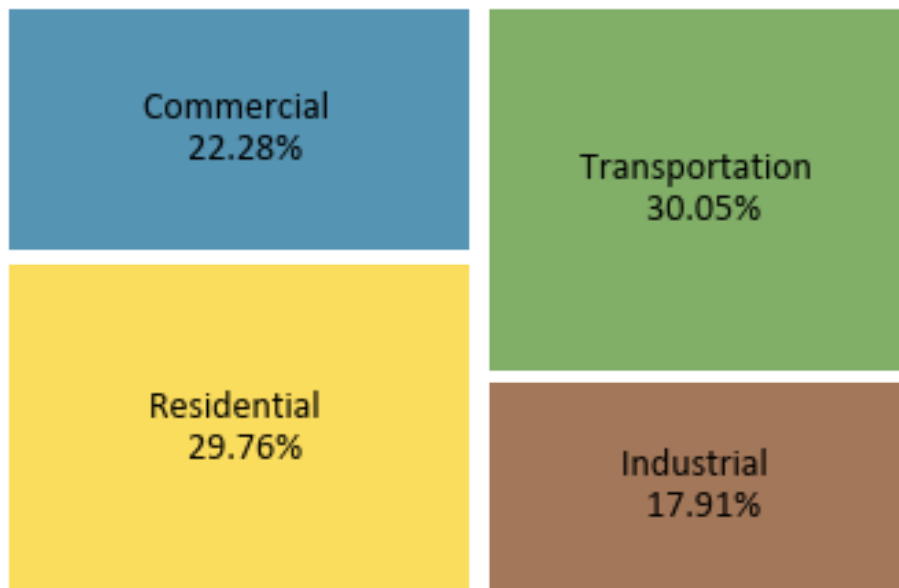
⁶ "Primary energy" refers to the energy source prior to its use for creating other forms of energy, e.g., coal before it is used to produce electricity. However, primary energy includes net imports of electricity. Source: U.S. Energy Information Administration (2022). ["Glossary."](#) U.S. Energy Information Administration.

⁷ U.S. Energy Information Administration (2022). ["Table CT1. Energy Consumption Estimates for Selected Energy Sources in Physical Units, Selected Years, 1960-2020, Missouri."](#)

⁸ U.S. Energy Information Administration (2022). ["Table C1. Energy Consumption Overview: Estimates by Energy Source and End-Use Sector, 2020."](#)

⁹ U.S. Energy Information Administration (2022). ["Table CT1. Energy Consumption Estimates for Selected Energy Sources in Physical Units, Selected Years, 1960-2020, Missouri."](#) State Energy Data System. Excludes residual fuel oil due to low quantity.

Figure 2. Energy Consumption in Missouri by End-Use Sector, 2020¹⁰



Excluding nuclear electric power, most of the primary energy produced on a British thermal unit (Btu) basis in Missouri in 2020 consisted of biofuels, i.e. biomass feedstock for ethanol and biodiesel; less than 50 billion Btu of marketed natural gas production occurred, so this production is not included below in Figure 3.¹¹ Net electricity generation in the state of Missouri primarily comes from coal, which provided 75.2% of the 76,941 gigawatt-hours (GWh) produced in the state in 2021.^{12, 13} Small-scale solar photovoltaic systems provided 433 GWh of generation in 2021 in addition to the 76,941 GWh generated from other sources.¹⁴

¹⁰ U.S. Energy Information Administration (2022). [“Table C1. Energy Consumption Overview: Estimates by Energy Source and End-Use Sector, 2020.”](#) State Energy Data System.

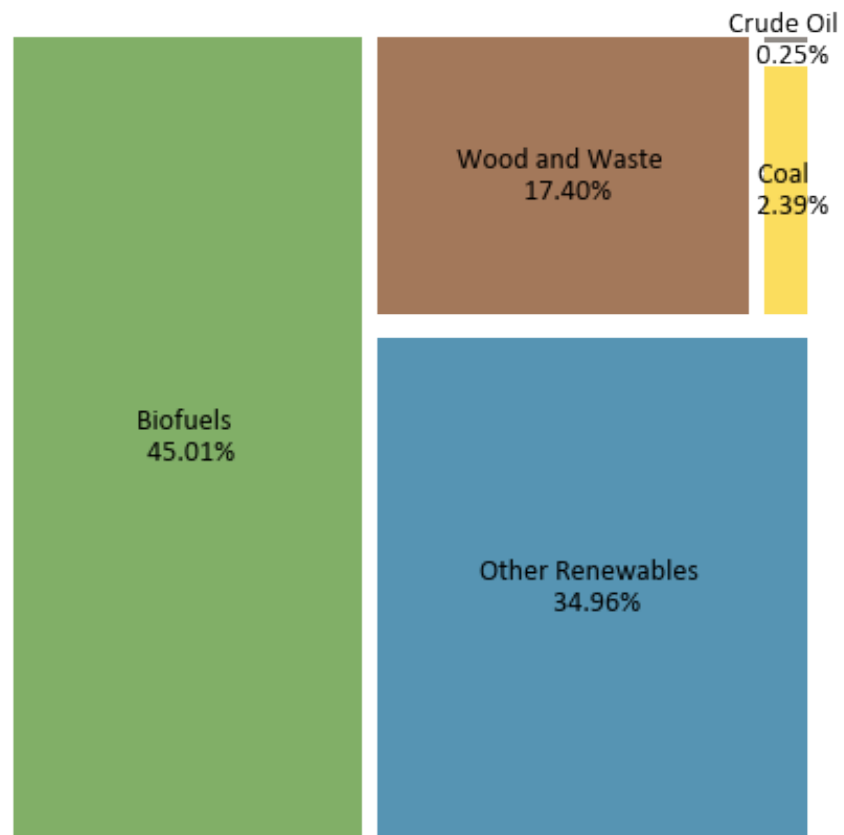
¹¹ U.S. Energy Information Administration (2022). [“Table P2. Primary Energy Production Estimates in Trillion BTU, 2020.”](#) State Energy Data System.

¹² These statistics and those in Figure 4 account for the electric power, commercial, and industrial sectors.

¹³ U.S. Energy Information Administration (2023). [Electricity Data Browser](#). U.S. Energy Information Administration.

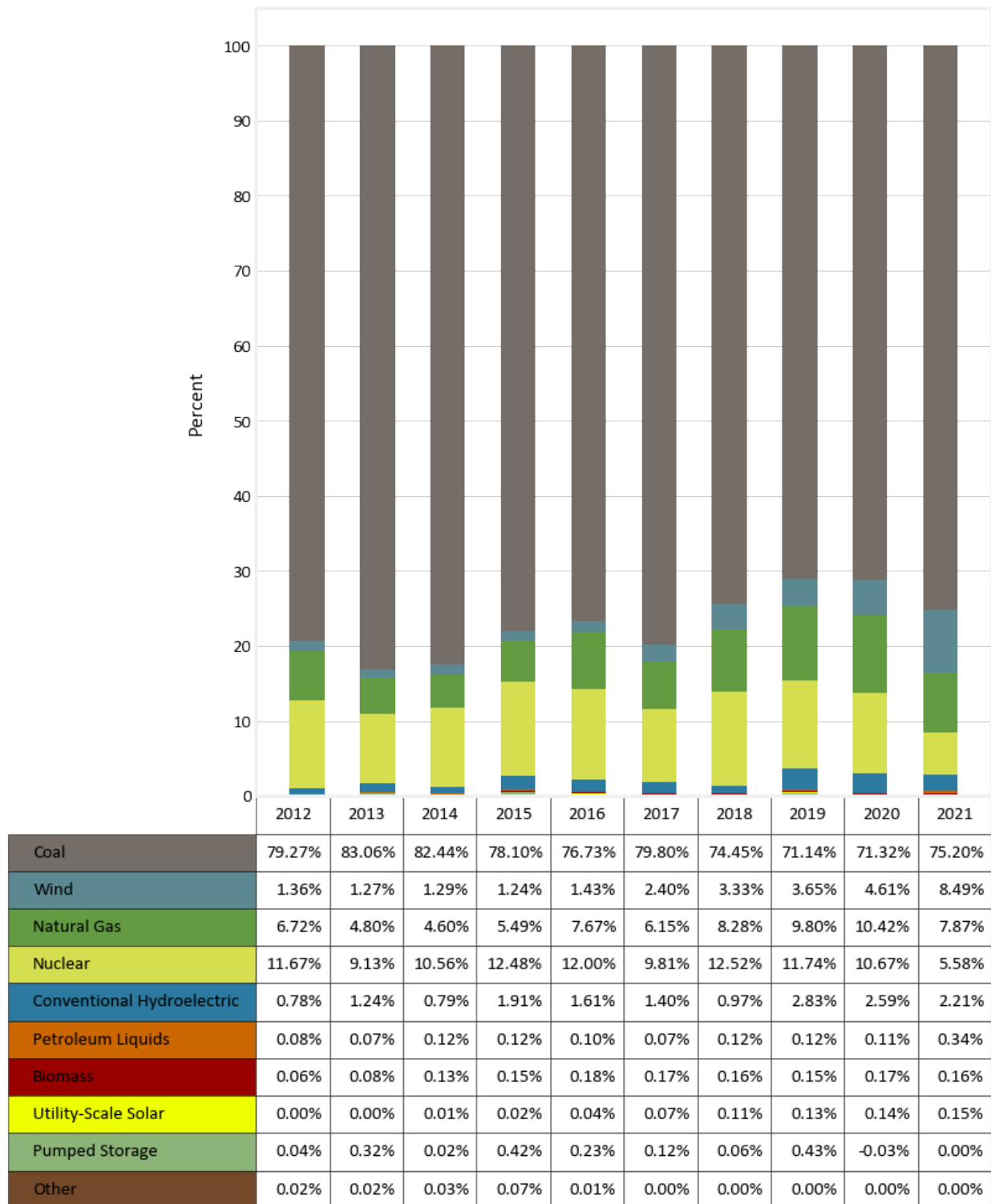
¹⁴ U.S. Energy Information Administration (2023). [Electricity Data Browser](#). U.S. Energy Information Administration.

Figure 3. Primary Energy Production in Missouri by Source, 2011-2020¹⁵



¹⁵ U.S. Energy Information Administration (2022). [“Table P2. Primary Energy Production Estimates in Trillion BTU, 2020.”](#) State Energy Data System. Excludes nuclear electric power. Natural gas production not included due to being less than 50 billion British thermal units.

Figure 4. Net Electricity Generation in Missouri by Fuel Source, 2012-2021¹⁶



¹⁶ U.S. Energy Information Administration (2023). "[Electricity Data Browser](#)." U.S. Energy Information Administration. Does not include generation from small-scale solar photovoltaic systems or values listed as "not meaningful." Values in table are percentages.

To compare energy expenditures across states, two metrics to consider involve expenditures per capita and per dollar of gross domestic product (GDP). These figures allow normalized comparisons based on population and economic activity, respectively. Missouri ranked below the national median for energy expenditures per capita in 2020; of Missouri's neighboring and comparable states, Illinois, Michigan and Ohio had lower ranks. At approximately 5.73 percent, Missouri ranked 23rd in the nation in energy expenditures per capita in 2020. Of Missouri's neighboring and comparable states, this was lower than Arkansas, Indiana, Iowa, Kansas, Kentucky, Oklahoma and Tennessee.¹⁷

Table 1. Energy Expenditures in Missouri, the U.S. and Comparison States, 2020¹⁸

	Total Energy Expenditures (billions)	Energy Expenditures Per Capita		Energy Expenditures as a Percent of Current Dollar Gross Domestic Product	
		Value	Rank	Value	Rank
Missouri	\$18.9	\$3,069	30	5.73	23
Arkansas	\$10.4	\$3,442	18	7.93	9
Illinois	\$34.1	\$2,668	45	3.97	45
Indiana	\$24.3	\$3,579	14	6.47	19
Iowa	\$12.7	\$3,981	7	6.53	18
Kansas	\$10.3	\$3,496	16	5.86	21
Kentucky	\$15.5	\$3,443	17	7.30	10
Michigan	\$29.1	\$2,887	37	5.64	26
Minnesota	\$17.6	\$3,092	29	4.72	37
Nebraska	\$7.6	\$3,894	8	5.72	24
Ohio	\$35.0	\$2,968	32	5.16	31
Oklahoma	\$13.1	\$3,308	20	6.97	13
Tennessee	\$21.4	\$3,093	28	5.79	22
Wisconsin	\$18.5	\$3,139	27	5.48	27
U.S.	\$1,007.4	\$3,039	N/A	4.82	N/A

¹⁷ U.S. Energy Information Administration (2022). [“Table E15. Total Energy Price and Expenditure Estimates \(Total, per Capita, and per GDP\), Ranked by State, 2020.”](#) State Energy Data System.

¹⁸ U.S. Energy Information Administration (2022). [“Table E15. Total Energy Price and Expenditure Estimates \(Total, per Capita, and per GDP\), Ranked by State, 2020.”](#) State Energy Data System.

b. Missouri's Energy Future

Based on available information, the department expects changes in the types of energy used to support Missourians and the state's economic activities. Along with new renewable energy resources, all of Missouri's investor-owned electric utilities anticipate adding firm, dispatchable generation,¹⁹ e.g., natural gas generation, which certain utilities may replace with fuels such as hydrogen.^{20, 21, 22, 23}

Ameren Missouri plans to reach net-zero carbon emissions by 2045 through the phased retirement of coal-fired units and natural gas combustion turbines, the addition of new generation initially fueled by natural gas, more renewable energy, battery storage, and use of yet-to-be-determined technologies. The company's most recent integrated resource plan includes retirement of the Rush Island Energy Center 14 years earlier than previously planned as the more economical choice over making significant mandatory investments in pollution control equipment.^{24, 25} The company indicated in a discussion with the department that its plan includes a staged transition of its aging generation fleet that maintains reliability and enables learning about new technologies. Ameren Missouri also noted the impacts of federal incentives on affordability. The company further articulated the need to ensure reliability through flexible, dispatchable generation such as natural gas combined cycle generation, battery storage, geographic diversity of renewable generation, and the timing of unit retirements. In addition, the company indicated increasing difficulty in finding sites for renewable energy that have adequate transmission and good capacity factors.

Evergy also plans to reach net-zero carbon emissions by 2045.²⁶ Furthermore, the company recently indicated shifts in planned investments in wind energy, solar energy, and natural gas generation, as well as a change in the retirement date of the Lake Road 4/6 generating unit, to

¹⁹ Generally, "dispatchable generation" can refer to resources that are able to flexibly meet demand. See Baroni, M. (2022), [The Integration of Non-dispatchable Renewables](#), in: Hafner, M., Luciani, G., (eds.) *The Palgrave Handbook of International Energy Economics*, Palgrave Macmillan, Cham.

²⁰ Ameren Missouri (2022). "[2022 Change in Preferred Plan](#)" (29). Case No. EO-2022-0362.

²¹ Evergy Missouri Metro (2022). "[Integrated Resource Plan 2022 Annual Update](#)" (10). Case No. EO-2022-0201.

²² Evergy Missouri West (2022). "[Integrated Resource Plan 2022 Annual Update](#)" (10). Case No. EO-2021-0202.

²³ Liberty-Empire (2022). "[2022 Triennial Integrated Resource Plan](#)" 1(7-9). Case No. EO-2021-0331.

²⁴ Ameren Missouri (2022). "[2022 Change in Preferred Plan](#)" (1-3). Case No. EO-2022-0362.

²⁵ Ameren Missouri (2022). "[2022 Integrated Resource Plan Update](#)" (1-3). Case No. EO-2023-0121.

²⁶ Evergy (2021). "[Evergy 2021 Integrated Resource Plan Overview](#)" (4-5). Case No. EO-2021-0035 and EO-2021-0036.

account for factors including responses to requests for proposals and company modeling. In addition, the company assumes the early retirement of at least one additional unspecified coal-fired unit.^{27, 28, 29}

Liberty-Empire's most recent triennial integrated resource plan filing provides for several additions of solar energy and energy storage, both separately and in combination, as well as a replacement dual-fuel unit and extended operations of peaking natural gas-fired Energy Center units 1 and 2.³⁰ Per a discussion between the company and the department, Liberty-Empire's recent planning occurred in the context of renewed emphases on resilience and reliability. The company also noted the need to balance decarbonization with cost and reliability. In addition, Liberty-Empire noted changes in regional transmission organization planning and the transmission-related costs and timing associated with new centralized generation resources.

In discussions with the department, Spire Inc. expressed its interest in an "all of the above" approach to energy in Missouri and noted its view of natural gas's role in supporting grid resilience and energy independence. The company plans to be carbon-neutral by 2050.³¹ From 2005 to 2021, Spire reduced utility methane emissions more than 46%, and the company plans to achieve a 59% reduction by 2025 and a 73% reduction by 2035.³² The company is also working toward providing renewable natural gas offerings.

Summit, in its discussion with the department, highlighted interest in renewable natural gas, hydrogen, and collaborating with electric power entities to assure reliability. The company indicated interest from customers in renewable natural gas, although, like Spire, it noted regulatory delays in doing so. Investor-owned natural gas utilities are authorized to offer voluntary renewable natural gas programs to customers,³³ although none have done so at this time. Summit also noted the role of its Rogersville Compressor Station in maintaining reliability for 12,000 customers during Winter Storm Uri. The Rogersville Compressor Station is part of its Central Missouri Transmission System Project.

²⁷ Evergy Missouri Metro (2022). "[Integrated Resource Plan 2022 Annual Update](#)" (6-13). Case No. EO-2022-0201.

²⁸ Evergy Missouri West (2022). "[Integrated Resource Plan 2022 Annual Update](#)" (6-14). Case No. EO-2022-0202.

²⁹ Evergy Missouri West (2022). "[Notification of Preferred Resource Plan Change](#)" (5-9, 13). Case No. EO-2023-0115.

³⁰ Liberty-Empire (2022). "[2022 Triennial Integrated Resource Plan](#)" 1(10-11, 54-55). Case No. EO-2021-0331.

³¹ Spire Inc. (2022) "[2021 Sustainability Report](#)" (23). Spireenergy.com.

³² Spire Inc. (2022) "[2021 Sustainability Report](#)" (19). Spireenergy.com.

³³ Section 386.895, RSMo. (2021).

Transportation infrastructure changes are anticipated as well. Many of the state's electric utilities provide support for transportation electrification, including Ameren Missouri,³⁴ Evergy,³⁵ Liberty-Empire³⁶ and City Utilities of Springfield.³⁷ The Bipartisan Infrastructure Law (BIL) also authorized funding for several alternative fuel programs, including the National Electric Vehicle Infrastructure (NEVI) formula program and competitive grants for charging and fueling infrastructure.³⁸ The Missouri Department of Transportation (MoDOT) is responsible for administering the NEVI formula funds in Missouri, with an initial focus on alternative fuel corridors.³⁹ The competitive grants for charging and fueling infrastructure will address refueling and charging along Alternative Fuels Corridors and within communities; eligible alternative fuels include electricity, natural gas, propane for certain vehicle applications, and hydrogen.⁴⁰ Ford announced a \$95 million expansion to its Kansas City production facilities to support additional production of conventional Transit and electric E-Transit vans.⁴¹

Other funding opportunities under the BIL include funding for hydrogen hubs,⁴² grid resilience⁴³ and energy infrastructure financing.⁴⁴ The Inflation Reduction Act (IRA) will provide additional funding for home energy efficiency rebates.⁴⁵ The department will publicize more information about BIL and IRA funding opportunities as details become available.

³⁴ Ameren Services (2022). "[Electric Vehicles](#)." Ameren Missouri.

³⁵ Evergy (2021, February 10). "[Electric Vehicle Programs Provide Benefit to Evergy Residential Customers in Missouri](#)." Evergy Newsroom.

³⁶ Liberty Utilities (2022). "[Liberty Transportation Electrification Programs](#)." Liberty Utilities.

³⁷ City Utilities (2022). "[Electric Vehicle \(EV\) Charging Rebates](#)." City Utilities.

³⁸ U.S. Department of Energy (2021, November 15). "[Bipartisan Infrastructure Law \(Infrastructure Investment and Jobs Act of 2021\)](#)." Alternative Fuels Data Center.

³⁹ Missouri Department of Transportation (2022). "[National Electric Vehicle Infrastructure Formula Program](#)." Missouri Department of Transportation.

⁴⁰ U.S. Department of Energy (2021, November 15). "[Bipartisan Infrastructure Law \(Infrastructure Investment and Jobs Act of 2021\)](#)." Alternative Fuels Data Center.

⁴¹ Missouri Partnership (2022, June 7). "[Ford Invests \\$95 Million in Missouri Facility](#)." Missouri Partnership.

⁴² Office of Clean Energy Demonstrations. "[Regional Clean Hydrogen Hubs](#)." U.S. Department of Energy.

⁴³ U.S. Department of Energy. "[Preventing Outages and Enhancing the Resilience of the Electric Energy Grid Grants](#)." Clean Energy Infrastructure.

⁴⁴ U.S. Department of Energy. "[Energy Efficiency Revolving Loan Fund Capitalization Grant Program](#)." Clean Energy Infrastructure.

⁴⁵ U.S. Department of Energy (2022). "[Biden-Harris Administration Announces State And Tribe Allocations For Home Energy Rebate Program](#)." U.S. Department of Energy.

3. Cycle 1 Initiative Updates

This section provides information on the progress made under the Cycle 1 initiatives.

a. Streamlining Solar Permitting

Solar permitting processes and timelines can vary greatly across different jurisdictions, delaying construction and adding additional costs. In addition, high permit loads can be challenging for authorities having jurisdiction (AHJs). Delays in solar permitting inhibit economic growth and prevent individuals and businesses customers from accessing renewable energy.

The National Renewable Energy Laboratory (NREL) — a national laboratory of the U.S. Department of Energy — developed standardized plan review software called SolarAPP+ that can run compliance checks and process building permit approvals for eligible rooftop solar energy systems. SolarAPP+ is free, online, integrates with existing government software, and automates and standardizes the permitting process for residential rooftop solar. NREL plans to expand the software to include applications such as battery storage and electric vehicle (EV) charging.

The Streamlining Solar Permitting workgroups communicated with NREL and the Solar Energy Industries Association about the SolarAPP+ adoption processes. The workgroup also identified Missouri jurisdictions that are on the appropriate code cycle for SolarAPP+ or otherwise well-suited to adoption. Outreach activities included preparing materials to communicate the benefits of SolarAPP+, contacting building departments and sustainability professionals to discuss SolarAPP+ and its benefits, recruiting for SolarAPP+ webinars, and meeting with other partners with an interest in code adoption and permitting improvements (e.g., Safer + Simpler Coalition in St. Louis County and Illinois SolarAPP+ advocates). Throughout this process, the workgroup noted current concerns from AHJs and monitored potential implications from recent federal legislation.

b. Electric Vehicle Infrastructure Development

The BIL provided new opportunities for EV charging station deployment through the NEVI formula program and competitive grants for charging and fueling infrastructure. MoDOT implements the NEVI funds in consultation with the Missouri Department of Natural Resources and others.

The availability of additional funds for EV charging infrastructure provided a potential opportunity for Missouri to build on its experience with implementing the Volkswagen Trust Fund.⁴⁶ Stakeholders anticipated that parties might seek information on how to apply for BIL-

⁴⁶ The state of Missouri is a beneficiary of the Volkswagen Trust Fund. The department served as the lead agency for the state and developed a plan to provide funding for various types of

related or other funding options to support EV charging station development. In addition, third parties may have insights that could inform the administration of future funds.

Based on the above considerations, the goal of this workgroup was to identify achievable milestones for the state, jurisdictions, and Missouri stakeholders that will support the continued expansion of affordable, reliable and safe EV infrastructure in order to support the state's energy economy. The workgroup planned to provide information to stakeholders and identify considerations related to future EV charging station funding opportunities.

The workgroup met several times in 2022 to discuss the best ways to convey information about EVs and associated infrastructure. Ultimately, one subgroup focused on identifying information and resources to provide to stakeholders, while another subgroup drafted a survey to identify information needs.

c. Residential Energy Efficiency Real Estate Valuation/Energy Efficiency on the Real Estate Industry's Multiple Listing Service

More efficient homes are not adequately valued by the market to account for the future energy cost savings the home will have as compared to a less efficient home. To address this issue, the workgroup planned to build on existing programs in the state, expanding education and training efforts to the financing, mortgage banking and underwriting communities, and considering policy needs. Members met several times and made progress in expanding REALTOR® education and education opportunities for energy auditor training.

d. Energy System Training and Installation at Schools

High school students need supervised opportunities to learn about energy efficiency and renewable energy systems, and Missouri needs to build a pipeline of skilled technicians for the energy industry. Schools could also benefit from energy upgrades that improve energy efficiency and lower energy costs.

Based on a proposal received at a regional MoSEP process meeting for Southeast Missouri, a workgroup formed to develop a work-based learning program at UniTec (a career and technical education center located in Bonne Terre, Missouri) centered on renewable energy systems, with an emphasis on solar energy. The workgroup intended to support a work-based learning program to teach high school students about energy and provide hands-on learning by working with local International Brotherhood of Electrical Workers members to install solar panels at a school. This effort would result in lower energy costs for the local school district. With success, the program would be replicated at participating school districts and then in other regions of the state.

projects, including EV charging infrastructure. See Missouri Department of Natural Resources. ["Volkswagen Trust Funds."](#) Missouri Department of Natural Resources.

The group in Southeast Missouri met to discuss ideas for a work-based learning program at UniTec. In August, the group presented to the advisory board of UniTec regarding an overview of a possible program and potential funding opportunities. The advisory board and UniTec administration were receptive to the idea of a work-based program, but did not make a decision at that time. In late October, the initiative champion and group revisited potential funding opportunities. The group visited Poplar Bluff Technical Career Center in December to learn about the installation of a solar energy system at the school and the inclusion of a solar curriculum into the school's heating, ventilation and air conditioning program.

e. Missouri Metals and Battery Storage

Increased demand for batteries and other technologies is leading to a greater need for critical minerals. Processing of energy storage-related materials occurs overseas, but significant cost and environmental savings could occur if such activities resumed in the U.S. Supply chain issues have also affected the industry.

By improving collaboration and engagement from existing businesses, technical partners, state leaders and higher education partners, this group sought to attract new businesses and to support existing battery companies and technologies. The group met several times to discuss these proposals and next steps.

f. Information Hub to Collect and Disseminate Best Practices and Opportunities in the Energy Sector

At the regional MoSEP process outreach meetings, stakeholders expressed interest in exchanging information and ideas through means such as a collaborative or information hub. Potential topics discussed included municipal utility efforts, energy efficiency and resilience. Although there is a substantial volume of information on energy-related topics, the information is not always readily accessible because stakeholders may not know where to look. There are also numerous collaboratives already established for certain topics such as energy efficiency.

An opportunity was identified to consolidate relevant materials based on stakeholder interests. The information hub workgroup planned to identify stakeholder knowledge gaps and share resources to fill in these gaps. In the short term, the group planned to issue a survey to identify knowledge gaps. The survey would inform the materials posted to an online information hub, which would be housed on the department's website. The workgroup also discussed how to ensure the quality of information provided for the hub.

4. Next Steps

Subsequent to the initiation of the MoSEP process, the U.S. Congress passed two bills with significant implications for the energy sector, including the department's Division of Energy. Both the BIL and the IRA contained significant additional funding for the department. The provisions of these bills will require considerable time and effort for the department to implement, and the tax credit provisions in the IRA may have a major impact on the national energy landscape. The department also notes that state House Bill 3 from the First 2022 Extraordinary Session provides additional incentives for biofuels.

The department notes that programs funded under the BIL and IRA may offer significant opportunities for continued collaboration on Missouri's energy future and address many of the core values of the MoSEP process. The department anticipates the potential for upcoming partnerships that leverage contacts and relationships made through the MoSEP process to-date and will work to identify those partnership opportunities. Since BIL and IRA program details are still being released from relevant federal agencies, the department will conduct outreach to and provide stakeholders with updates as warranted. The department thanks the MoSEP initiative champions, stakeholders and meeting attendees for their participation thus far and looks forward to continuing the energy planning process in the future.